



Personnel Administration

Chapter 4

Perform Promotions, Demotions, and Changes in Pay



Perform Promotions, Demotions, and Changes in Pay Objectives

By the end of this chapter, you will be able to:

- Process Promotion
- Process Demotion
- Process Changes in Pay

Change in Pay/Position Attributes

The screenshot displays the SAP HRPA-Personnel Administration interface. At the top, there is a menu bar with options: HR Master Data, Edit, Goto, Extras, Utilities, Settings, System, and Help. Below the menu bar is a toolbar with various icons. The main window is titled 'Personnel Actions' and contains a search area with 'Personnel no.' and 'From' fields. Below this is a table titled 'Personnel Actions' with columns: Action Type, Person., EE group, and EE subg. The table lists various actions such as Hire, Hire Board or Commission Membr, Rehire, Re-employment of Retiree, Change in Pay/Posn Attributes, Transfer, Promotion/Demotion, DROP, LWOP - Inactive Status, Return from Leave, Termination, Retirement, Concurrent Employment, and Terminate Concurrent Empl. The 'Change in Pay/Posn Attributes' action is highlighted. At the bottom right of the window, there is a status bar showing 'ETR (1) (510)' and 'sapetr INS'.

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The Change in Pay action allows you to adjust an employee's pay. For example, an employee hired into an unclassified position cannot exceed the line item maximum.

If the employee is not at Line Item Maximum, the agency would perform a change in pay action to increase the employee's pay.



Basic Pay (0008)

Infotype Edit Info Wage types Extras System Help

Display Basic Pay

Salary amount Payments and deductions

Personnel No. 1499 Name Turner Status Active
EE group 7 State Extra/Besso Personnel ar FA01 DFA
EE subgroup 00 Hourly SSN 432-54-1441
Start 09/20/2004 to 12/31/9999 Changed on 10/14/2004 GL0RR

Subtype 0 Basic contract

Salary

Reason 82 New Hire at Band1 Capacity util. level 100.00
PS type 81 Classified Work hours/period 80.00 Biweekly
PS area 81 State of Arkansas
PS group 18 Level 81 Annual salary 24,419.85 USD

Wage Type Long Text	Amount	Curr. T.	Number/Unit	Unit
1013 Extra Help Hourly Rate	11.7356	USDN	✓	0.00

IV 10/22/2004 12/31/9999 11.7356 USDN Payroll Simulation

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The Basic Pay (0008) infotype enables you to increase or decrease the employee's salary due to situations such as promotion, demotion, Exceptionally Well Qualified (EWQ), Labor Market or Special Language.

There are certain guidelines set by OPM/Class and Comp that **must** be complied with before the Change in Pay action is processed. For example, to change an employee's pay due to a special rate (such as EWQ- exceptionally well qualified), requires prior approval from OPM. The agency needs to send the OPM 081 form to Class and Comp for prior approval. Please refer to the OPM website for further guidelines.
www.state.ar.us/dfa/



Basic Pay (0008), continued

Display Basic Pay

Salary amount | Payments and deductions

Personnel No. 1499 Name Turner Status Active
 EE group 7 State Extra/Besso Personnel ar FA01 DFA
 EE subgroup 00 Hourly SSN 432-54-1441
 Start 09/20/2004 to 12/31/9999 Changed on 10/14/2004 GL0RR

Subtype 0 Basic contract

Salary

Reason 02 New Hire at Band1 Capacity util. level 100.00
 PS type 01 Classified Work hours/period 80.00 Biweekly
 PS area 01 State of Arkansas
 PS group 10 Level 01 Annual salary 24,410.05 USD

Wage Type	Long Text	Amount	Currency	Unit
1013 Extra Help Hourly Rate		11.7356	USDN	0.00

10/22/2004 12/31/9999 11.7356 USDN Payroll Simulation

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The Pay Scale Type identifies if the position is classified, unclassified. The Pay Scale Area identifies the State of Arkansas as the payer for the position. The Pay Scale Group identifies the grade of the position. The Pay Scale Level reflects the minimum and maximum for the grade level of the position. All of these fields default from the employee's position. These fields cannot be changed. If the information is incorrect, contact OPM/Class and Comp or the AASIS Help Desk @ 501-682-2255, for assistance.

To perform a Change of Pay, you will need to enter the employee's new hourly rate. The system will calculate the employee's new annual salary amount. You must use the correct reason code. Refer to the AASIS website for salary edit rules.

<http://aasis.state.ar.us/Training/CourseWare/CWareHRPA.htm>

For a Promotion or Demotion action, the system will adjust the employee's hourly rate. You do not enter an hourly rate. The employee's annual salary will reflect an increase or decrease of 6% or 8%, whichever is appropriate.



Change in Position Attributes

The screenshot shows the SAP Personnel Actions window. At the top, there is a menu bar with options: HQ Master Data, Edit, Goto, Extras, Utilities, Settings, System, and Help. Below the menu bar is a toolbar with various icons. The main window is titled 'Personnel Actions'. It contains a 'Personnel no.' field with a dropdown arrow and a 'From' field. Below these fields is a list of action types. The 'Change in Pay/Posn Attributes' action type is highlighted. The list of action types includes: Hire, Hire Board or Commission Membr, Rehire, Re-employment of Retiree, Change in Pay/Posn Attributes, Transfer, Promotion/Demotion, DROP, LWOP - Inactive Status, Return from Leave, Termination, Retirement, Concurrent Employment, and Terminate Concurrent Empl. At the bottom of the window, there is a status bar with the text 'ETR (1) (510) sapetr INS'.

Action Type	Personn.	EE group	EE subg.
Hire			
Hire Board or Commission Membr			
Rehire			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP - Inactive Status			
Return from Leave			
Termination			
Retirement			
Concurrent Employment			
Terminate Concurrent Empl.			

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The Change in Pay/Position Attributes action also allows you to modify an employee's personnel area, personnel subarea, employee group, employee subgroup and/or when an employee goes from full-time to part-time, or vice-versa.

Remember: You must request approval for a personnel subarea change thru OPM/Class & Comp.



Exercise Scenario #9

An employee's basic pay needs to be changed due to a pay increase for an unclassified position.
Perform a Change in Pay Action.



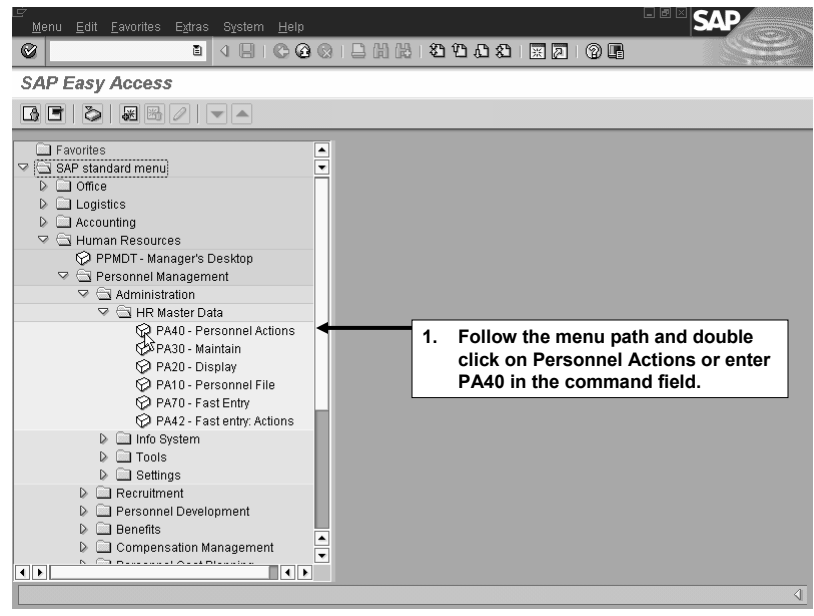


Demonstration

Change in Pay

Human Resources > Personnel Management >
Administration > HR Master Data > Personnel Actions
(PA40)







The screenshot shows the SAP Personnel Actions screen. The top menu bar includes 'HR Master Data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar says 'Personnel Actions'. The main area contains a form with the following fields:

- Personnel no.: P433
- Name: Turner, Quartez
- EE group: 7 State Extra/Sea.. Pers.area: FA01 DFA
- EE subgroup: U0 Hourly Cost Center: 353260 DFA
- From: 07/01/2005

Below the form is a table titled 'Personnel Actions' with columns 'Action Type', 'Personn.', 'EE group', and 'EE subg.'. The table lists various action types, with 'Change in Pay/Posn Attributes' highlighted. At the bottom right, there is a status bar with 'ETR (1) (5:10)', 'sapetr', and 'INS'.

Numbered callouts on the screen indicate the following steps:

5. Click Execute. (points to the Execute button)
2. Enter Personnel number. (points to the Personnel no. field)
3. Enter the effective date. (points to the From field)
4. Select 'Change in Pay'. (points to the 'Change in Pay/Posn Attributes' row in the table)

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Note: The effective date **must not** be earlier than the beginning of the first pay period of the fiscal year. For example, an action initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have the Change in Pay effective beyond the beginning of the first pay period of the fiscal year, the agency must send a request with justification to State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for processing.



Infotype Edit Goto Extras System Help

Copy Actions

Execute info group

7. Click Enter.

Name Turner, Quantez

EE group 7 State Extra/Seaso Personnel ar FA01 DFA

EE subgroup U0 Hourly SSN 432-54-1441

Start 09/28/2004 to 12/31/9999

Personnel action

Action Type Change in Pay/Posn Attributes

Reason for Action 01

6. Select the reason for the change in pay from the drop-down list. For this exercise, select 'Pay Increase'.

Status

Customer-specific No Concurrent

Employment Active

Special payment Standard wage type

Organizational assignment

Position 22078413 BUYER II

Personnel area FA01 DFA

Employee group 7 State Extra/Seasonal

Employee subgroup U0 Hourly

8. Click Save.

Note: The reasons for the Change in Pay are as follows: Pay Increase, Pay Decrease, Adjustment/Correction, Special Admin., Reduction in Work Hours or Time Percentage Adjustment. The Reason code selected for the Action infotype 0000 must correspond with the Reason code selected for the Basic Pay infotype 0008.



InfoType Edit Goto Extras System Help

Copy Organizational Assignment

Org Structure

10. enter

11. save

Personnel No.	Name	Quater	Status	Active
EE group	7 State Extra/Seaso...	FA01	DFA	
EE subgroup	U0 Hourly	SSN	462-22-5856	
Start	09/20/2004 to	12/31/9999		

Enterprise structure

CoCode	ARK	State of Arkansas	Leg.person	
Pers.area	FA01	DFA	Subarea	0AL2 OT,Std,HB
Cost Ctr	383260	DFA	Bus. Area	0610 DEPT OF FINANCE AND ...

Personnel structure

EE group	7	State Extra/Seasonal	Payr.area	11 Arkansas Bi-Weekly
EE subgroup	U0	Hourly	Contract	1000 Hours/Year

Organizational plan

Percentage	100.00			
Position	22878413	V006		
		BUYER II		
Job key	21667977	9999		
		EXTRA HELP		
Exempt	N			
Org. Unit	21705310	DIR		
		Directors Office		

Administrator

PersAdmin	117	Constance L. Staggers
Time	113	Sammy Lewis
PayAdmin	123	Linda R. Hill

9. Select personnel administrator, time adm, Payroll adm, benefits adm.

Additional fields

Benefits Administrator	125	Phylcia Gates
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ETR (1) (515) sapetr OVR

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InfoType Edit Goto Extras System Help

Create Planned Working Time

Work schedule

Personnel No 1498 Name Tu
EE group 7 State Extra/Season Personnel ar FA01 DFA
EE subg 432-54-1441
Start 999

12. Click Enter.

Work schedule rule

Work schedule rule OPEN08
Time Mgmt status 1 - Time evaluation of actual times
Working week Sunday to Saturday
☐ Part-time employee

Working time

Employment percent 100.00 ☐ Dyn. daily work schedule
Daily working hours
Weekly working hours 0.00
Monthly working hrs 0.00
Annual working hours 0.00
Weekly workdays

Choose a valid function ETR (1) (515) sapetr INS

13. Click Save.

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The screenshot shows the SAP 'Copy Basic Pay' dialog box. The 'Salary amount' tab is active. Callout 16 points to the 'Enter' key on the keyboard. Callout 17 points to the 'Save' button. Callout 14 points to the 'Reason' drop-down menu. Callout 15 points to the 'Amount' field in the table below.

Wage Type	Long Text	Q	Amount	Curr.	S.	A.	Number	Unit	Unit
1013 Extra Help Hourly Rate			11.7350	USDN					
				USDN					
				USDN					
				USDN					
				USDN					
				USDN					

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Note: The Reason code selected for the change to the employee's Basic Pay infotype 0008 must correspond with the Reason code selected for the Action infotype 0000.

Every bi-weekly employee (including salary employees) has an hourly rate. Enter the hourly rate in the 'Amount' field, for example 12.5123. To view the employees hourly pay range, go to the 'Level' field and click on the selection icon. The minimum and maximum hourly rate will be reflected.



Exercise Scenario #10

- An employee at your agency received a promotion. Process a Promotion Action for the employee.





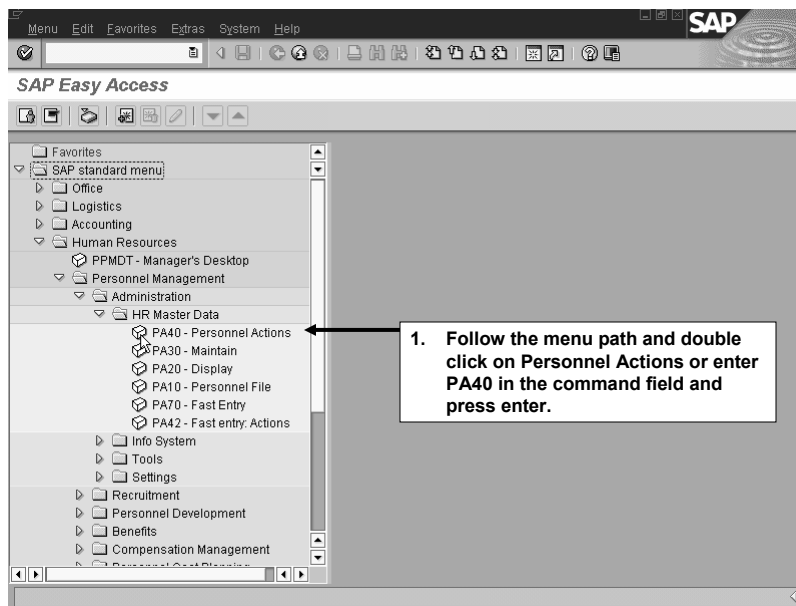
Demonstration

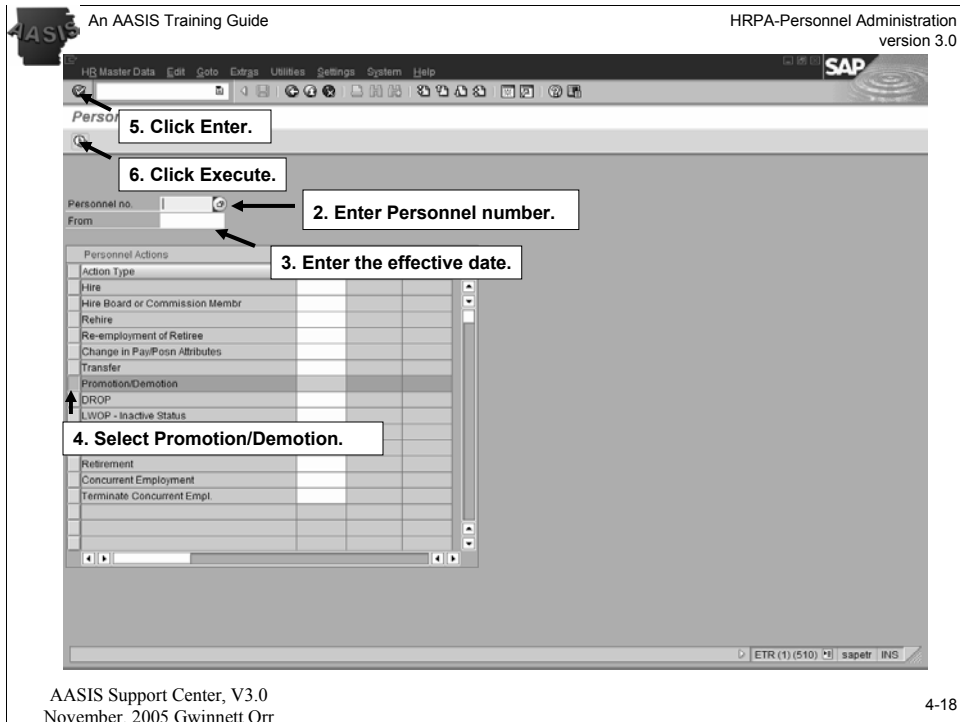
Promotion

Human Resources > Personnel Management >
Administration > HR Master Data > Personnel Actions
(PA40)



Remember: If you are processing a CLIP promotion, verify with the person who has the role of Agency Org. and Comp. Specialist that the position has been restored back to the original classification before you begin the Action. Otherwise, the promotion will not process properly.





Note: The effective date must not be earlier than the beginning of the first pay period of the fiscal year. For example, an action initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have an effective date beyond the beginning of the first pay period of the fiscal year, the agency must send a request with justification to State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



Infotype Edit Data Extras System Help

Copy Actions

Execute info group Change info group

9. Click Enter.

10. Click Save.

Personnel action

Action Type Promotion/Demotion

Reason for Action

7. Select the reason for the promotion from the drop-down list.

Status

Customer-specific No Concurrent Employment

Employment Active

Special payment Standard wage type

Organizational assignment

Position 22878413 BUYER II

Personnel area FA01 DFA

Employee group 7 State Extra/Seasonal

Employee subgroup 00 Hourly

8. Enter the employee's new position number or use the drop-down list to select the new position number.

Additional actions

Start date	Act.	Action type
09/20/2004	ZF	Hire

Invalid combination of action type ZU/action reason

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Note: The Reason code selected for the Action infotype 0000 must correspond with the Reason code selected for the Basic Pay infotype 0008.



InfoType Edit GoTo Edit System Help

Copy Organizational Assignment

14. Click Enter.

15. Click Save.

Personnel No	2432	Name	000002	Status	Active
EE group	7	State Extra/Seaso	FA01	DFA	
EE subgroup	U0	Hourly	SSN	462-22-5856	
Start	09/20/2004	to	12/31/9999		

Enterprise structure

CoCode	ARK	State of Arkansas	Leg person	
Pers. area	FA01	DFA	Subarea	0AL2 OT,SM,HR
Cost Ctr	383260	DFA	Bus. Area	0010 DEPT OF FINANCE AND ...

Personnel structure

EE group	7	State Extra/Seasonal	Pay. area	11 Arkansas Bi-Weekly
EE subgroup	U0	Hourly	Contract	1000 Hours/Year

11. Select the employee's scheduled working hours from the drop-down list.

Organizational plan

Percentage	100.00	
Position	22070413	V006 BUYER II
Job key	21687977	9999 EXTRA HELP
Exempt	N	
Org. Unit	21705210	DIR Directors Office

Administrator

PersAdmin	117	Phyllis L. Staggars
Time	113	Sherry Lewis
PayAdmin	123	John R. Hill

12. Select the employee's personnel, time and payroll administrator from the drop-down list.

Additional fields

Benefits Administrator	125	Phyllis Gates
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13. Select the employee's benefits administrator from the drop-down list.

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The screenshot shows the SAP 'Copy Addresses' form. The form is titled 'Copy Addresses' and has a menu bar with 'InfoType', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The SAP logo is in the top right corner. The form contains several sections: 'Personnel No.' (1498), 'Name' (Turn), 'EE group' (7), 'State Extra/Seasio' (FA8), 'EE subgro' (432-54-1441), and 'Start' (999). Below this is the 'Address' section with fields for 'Address type' (Business address), 'Address line 1' (1509 West 7th Street), 'Address line 2', 'City' (Little Rock), 'State/Zip Code' (AR, Arkansas), 'Country Key' (USA), and 'Telephone number'. There is also a 'Communications' section with a table for 'Type', 'Number', and 'Exte'. At the bottom, there is an 'Additional fields' section with 'Address Release Flag'. Numbered callouts point to specific fields: 16 points to 'Address line 1', 17 points to 'City', 18 points to 'Country Key', 19 points to 'State/Zip Code', 20 points to 'Zip Code', 21 points to 'Telephone number', 22 points to the 'Enter' button, and 23 points to the 'Save' button.

23. Click Save.

22. Click Enter.

16. Enter the business street number and name.

17. Enter the city name.

18. Enter the county name.

19. Enter the State.

20. Enter the zip code.

21. (Optional) Enter the business area code and phone number.

Note: If the Business address and phone number does not change, then skip to steps 22 & 23.



Copy Unemployment State

26. Click Save.

Click the forward icon, if changes are not required.

25. Click Enter.

24. (Optional) Select the employee's appropriate worksite by using the drop-down list.

Unemployment data

Tax authority AR Arkansas

Worksite

Record created ETR (1) (515) sapetr INS

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Note: If the Unemployment State information does not change, click the forward icon to advance to the next screen. This will take you to the Addresses infotype, subtype Permanent residence.



The screenshot shows the SAP 'Copy Addresses' dialog box. The 'Personnel No.' is 1498, 'Name' is Turner, 'FA01', and '432-54-1441'. The 'Start' date is 12/20/2004 and the 'End' date is 12/31/9999. The 'Address' section is expanded, showing 'Address type' as 'Permanent residence', 'City' as 'Little Rock', 'State/Zip Code' as 'AR Arkansas 72204', and 'Country Key' as 'USA'. The 'Communications' section is also expanded, showing a table with columns 'Type', 'Number', and 'Ext'. The 'Additional fields' section is collapsed. Annotations include: 'Click Cancel, if changes are not required.' pointing to the Cancel icon (red X); '28. Click Enter.' pointing to the Enter key icon; '29. Click Save.' pointing to the Save icon; and '27. Verify the employee's address and (optional) telephone information. If necessary, change.' pointing to the address and communication fields.

infotype Edit Data Exits System Help

Copy Addresses

Personnel No. 1498 Name Turner FA01 432-54-1441

EE group: EE subgroup: Start 12/20/2004 to 12/31/9999

Address

Address type Permanent residence

City Little Rock

State/Zip Code AR Arkansas 72204

Country Key USA

Telephone number

Communications

Type	Number	Ext
Type	Number	Ext
Type	Number	Ext
Type	Number	Ext

Additional fields

Address Release Flag

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Note: If the employee's Permanent residence information does not change, click the Cancel icon (red X). This will take you to the Planned Working Time infotype.



InfoType Edit Data Edges System Help

Create Planned Working Time

30. Click Enter.

31. Click Save.

EE group 7 State Extra/Seaso. Personal ar FA01 DFA
EE subgroup U0 Hourly SSN 432-54-1441
Start 12/20/2004 To 12/31/9999

Work schedule rule
Work schedule rule OPEN00
Time Mgmt status 1 - Time evaluation of actual times
Working week Sunday to Saturday
☐ Park-time employee

Working time
Employment percent 100.00 ☐ Day-daily work schedule
Daily working hours
Weekly working hours 0.00
Monthly working hrs 0.00
Annual working hours 0.00
Weekly workdays

If necessary, change the defaulted information.

ETR (1) (515) sapetr INS



The screenshot shows the SAP 'Copy Basic Pay' dialog box. Annotations include:

- 33. Click Enter.** pointing to the 'Enter' button in the top toolbar.
- 34. Click Save.** pointing to the 'Save' button in the top toolbar.
- 32. Select the reason from the drop-down list.** pointing to the 'Reason' dropdown menu.

Fields visible in the dialog include:

- EE group: 7, State Extra/Seaso., Personnel ar: FAB1, DFA
- EE subgroup: 00, Hourly, SSN: 432-54-1441
- Start: 12/20/2004, End: 12/31/9999
- Subtype: 0, Basic contract
- Salary: Reason: 05, Capacity util. level: 100.00
- PS type: 01, Classified
- PS area: 01, State of Arkan
- PS group: 18, Level: 01, Annual salary: 24,410.05 USD

Wa.	Wage Type Long Text	O.	Amount	Curr.	t.	A.	Number/Unit	Unit
1013	Extra Help Hourly Rate		11.7356	USDN				
				USDN				
				USDN				
				USDN				
				USDN				
				USDN				

At the bottom, there is a date range: 12/20/2004 - 12/31/9999, an amount of 11.7356 USDN, and a 'Payroll Simulation' checkbox.

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Note: The Reason code for the change to the employee's Basic Pay infotype 0008 must correspond with the Reason code selected for the Action infotype 0000. Remember, for a Promotion action, the system will adjust the employee's hourly rate. Do not enter an hourly rate. The employee's annual salary will reflect an increase or decrease of 6% or 8%, whichever is appropriate after clicking 'Enter'. **Before saving the infotype, verify that all messages are validated first.** In other words, do not click save, until you receive the message "Save your entries."

To verify the hourly rate and annual salary, display the employee's Basic Pay infotype 0008 thru the Display HR Master Data (PA20).



The screenshot shows the SAP 'Copy Monitoring of Dates' screen. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main data area contains the following fields:

Field	Value
EE group	1 Regular State Em...
EE subgroup	UE Employee
Name	Personnel ar
SSN	546-87-9632
WE01	Workforce Education-Rehab Svcs

Below the data area, there are sections for 'Task type', 'Date', 'Reminder', and 'Comments'. The 'Task type' dropdown is set to 'End of Probation'. The 'Date' field is set to '07/09/2001'. The 'Reminder' section has fields for 'Reminder date' and 'Lead/follow-up time'. The 'Comments' section is at the bottom.

Numbered callouts on the screen:

- 35. You may select multiple task types to Monitor from the drop-down list, ie. 'End of Probation'.
- 36. If necessary, enter the new task type date.
- 37. Click Enter.
- 38. Click Save.
- 39. Click Exit to go to the Main Menu.

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Note: This screen is optional. If you do not want to store any information on this screen, then skip to step 39.



Questions and Answers

